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THE Tobacco SITUATION

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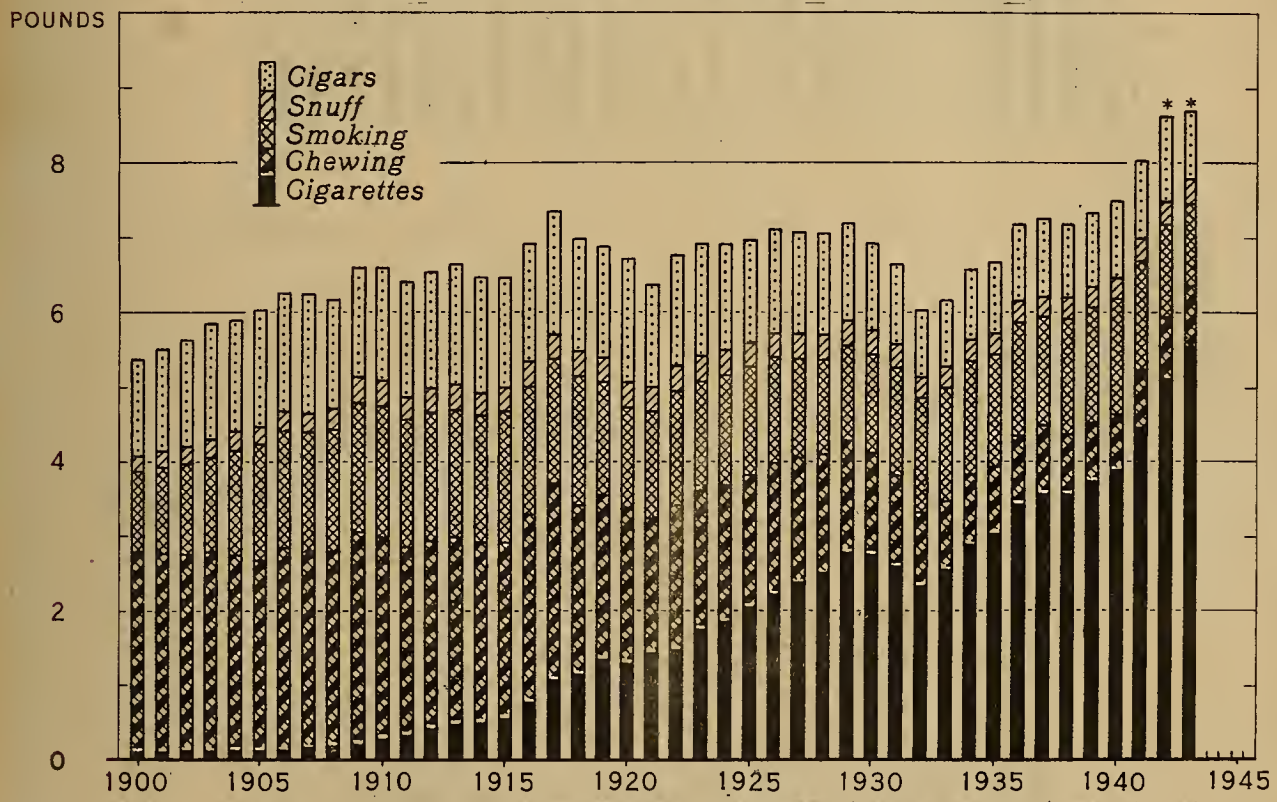
TS-28 BAE MARCH 1944

TOBACCO PRODUCTS: CONSUMPTION PER CAPITA IN THE UNITED STATES, 1900-1943



BASED LARGELY ON TAX PAID WITHDRAWALS, BUREAU OF INTERNAL REVENUE * PRELIMINARY

U. S. DEPARTMENT OF AGRICULTURE NEG. 24080 BUREAU OF AGRICULTURAL ECONOMICS

Per capita consumption of tobacco products reached an all-time peak in 1943, mainly because of increased consumer purchasing power and other wartime conditions. Total consumption in each year since 1932 has shown an increase over the preceding year. Consumption of cigarettes is at the highest level on record, but consumption of cigars and chewing tobacco below a year ago. Consumption of snuff increased, partly because of increased incomes and factory employment, but consumption of smoking tobacco declined. There has been a markad upward trend in the proportion of the total consumption represented by cigarettes, and a decline in the proportion represented by cigars and manufactured tobacco. The outlook is for only a slight further increase in total consumption in 1944.

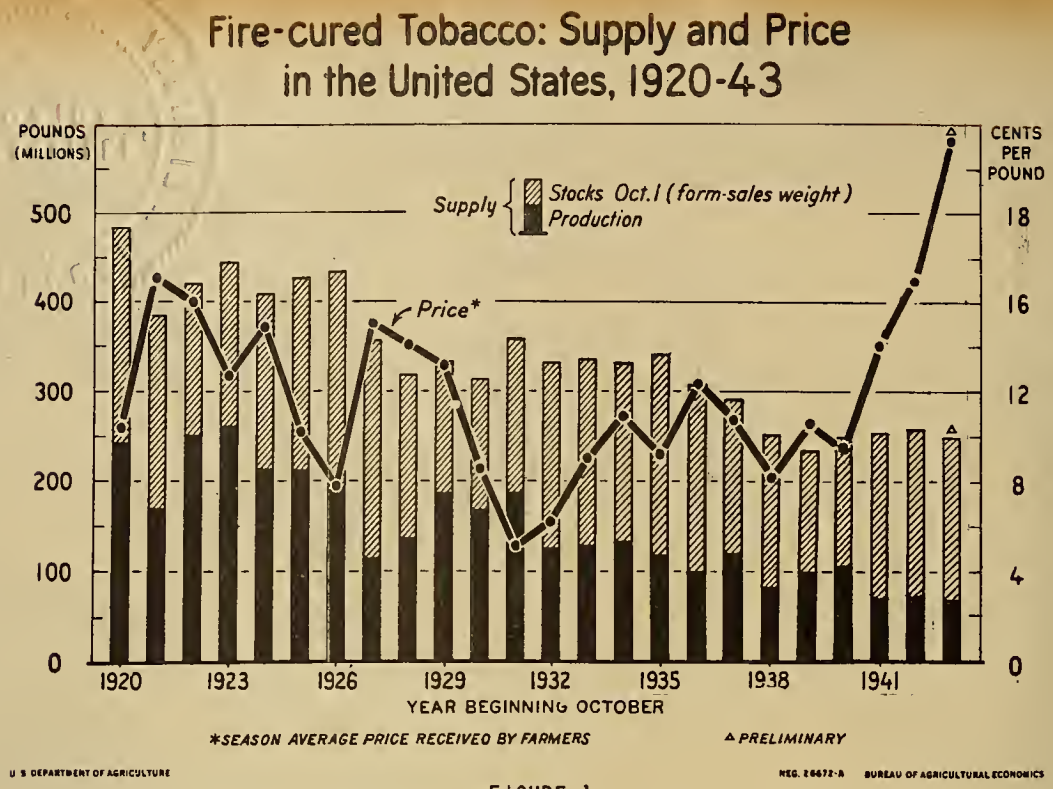


FIGURE 1

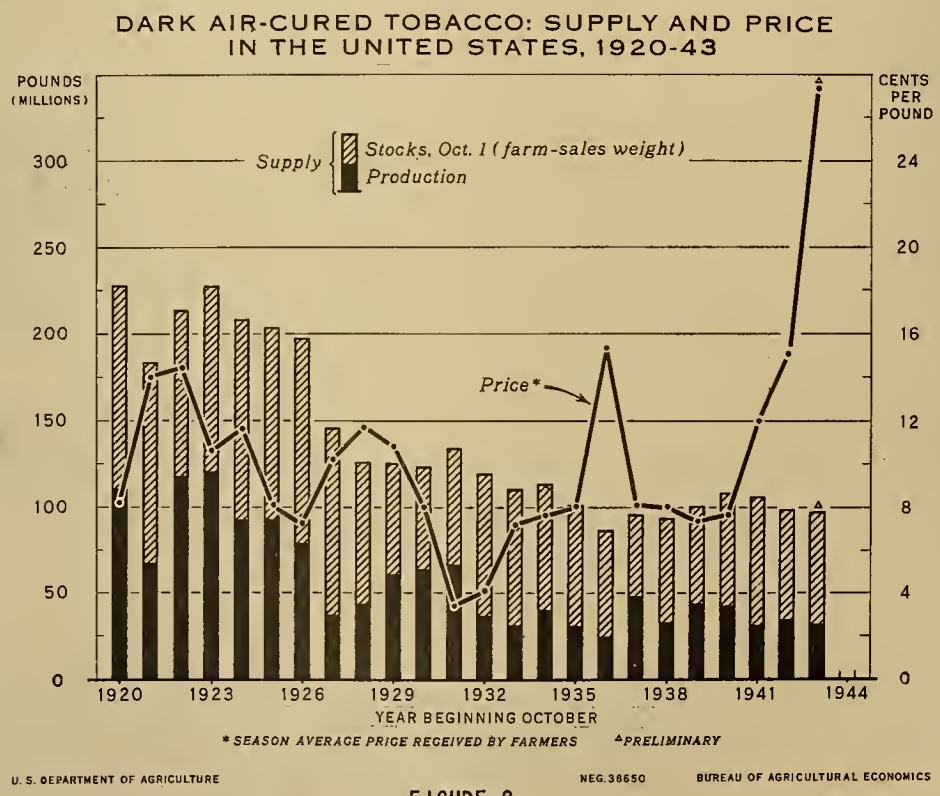


FIGURE 2

During the 20-year period 1920 to 1940, the trend in demand for the dark tobaccos produced in this country was downward, largely because of declining exports. Consequently, the trend in prices paid to farmers was downward. Since the outbreak of war, however, prices of all dark tobaccos have advanced sharply, because of increased demand for products manufactured from the dark types, increased byproducts diversion, and improved outlook for exports. Through the combined efforts of Government and growers in recent years, production and total supply have been kept in line with demand.

THE TOBACCO SITUATION

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Summary

According to the Crop Reporting Board of the United States Department of Agriculture, the largest tobacco acreage since 1939 is in prospect this year. Growers' intentions as of March 1 were to plant 1,715,600 acres, an increase of 17.4 percent over last year's harvested acreage of 1,461,800 acres. If this acreage is planted, it would be exceeded only by the 1939 acreage, when 1,999,900 acres were harvested. Should the March 1 intended acreage materialize, and the 5-year (1938-42) average yields by States and types be obtained, the 1944 tobacco production would exceed last year's crop by about 18 percent and would be one of the largest on record.

Growers plan to increase flue-cured acreage 18 percent, from 846,400 acres harvested in 1943 to 996,300 planted in 1944. This acreage with 1938-42 average yield would produce a crop of 946 million pounds, which would be 20 percent greater than last year's crop and would be surpassed in size only by the record crop of 1939. For burley tobacco, March intentions point to a 1944 acreage 21 percent greater than that harvested in 1943. The 478,000 indicated acreage, with the 5-year (1938-42) average yield, would produce a 456 million-pound crop. This would be about 18 percent

above last year's production, and about 7 percent greater than the previous record crop of 424.7 million pounds produced in 1931. Maryland growers plan an increase of 15 percent in acreage this year, while indications point to a 4 percent increase in acreage of dark-fired and 32 percent in dark air-cured. Among cigar tobaccos, an increase of 12 percent is indicated for wrappers, and 8 percent in binders, while a decrease of 3 percent is in prospect for the filler types.

Prices paid growers for all major types of the 1943 crop of tobacco were substantially above those paid for the 1942 crop. Higher prices were especially pronounced for dark tobaccos, but substantial advances occurred for burley and for some types of flue-cured and cigar tobaccos. Returns to growers are estimated at about 593 million dollars, compared with 517 million received for the 1942 production.

The 1943 crop of flue-cured, estimated at about 791 million pounds, was sold at an average of almost 40 cents per pound, the highest price since 1919, when growers received 44.4 cents per pound. Reflecting the high level of domestic manufacturing of cigarettes, substantial lend-lease shipments and other exports, the demand for flue-cured was strong and prices well maintained throughout most of the season. Under an international program of distribution of flue-cured tobacco, supplies were allocated to the various allied and friendly nations. A price ceiling was placed on the 1943 crop by the Office of Price Administration before the markets opened in July, and restrictions were placed on manufacturers' and dealers' purchases of the 1943 production.

Sales of the 1943 crop of burley began December 6 with unusually strong demand for all grades of leaf. When sales were completed on March 24, gross marketings amounted to 395.4 million pounds at an average of 45.5 cents per pound -- the highest average price on record. It is probable that the

1943 crop established new records for crop value, and average prices for many individual grades. Reflecting the demand for cigarette leaf, all grades suitable for cigarette manufacturing sold at ceiling prices throughout the season. The crop was allocated to buyers, as in the case of flue-cured, and price ceilings by individual grades were again in effect.

With sales of the 1943 crop practically completed, prices of all dark tobaccos have averaged considerably higher than the 1942-43 season average. The large consumption of snuff and plug chewing tobacco, and the improved outlook for exports to Africa and the liberated countries have contributed to strength of prices of dark tobaccos this season. The War Food Administration is also continuing the program of encouraging the diversion of low-grade leaf into the production of nicotine for insecticide purposes. Certain grades of dark tobaccos were reserved for this purpose and prices were established in keeping with market conditions. These purchases were handled by the growers' Associations as agents for the manufacturers of byproducts.

Largely as a result of increased domestic usage, stocks of all major types of tobacco are below a year ago. Additions to manufacturers' and dealers' stocks through purchases of the 1943 crop did not equal the season's disappearance for most types. With domestic consumption of tobacco products tending to level off, and a large increase in production in prospect, it is probable that the supplies of most types of leaf available for domestic consumption during the 1944-45 season will be much larger in relation to utilization than was the case a year ago.

-- March 1944

FLUE-CURED, TYPES 11-14

March Intentions Point to Second Largest Crop on Record

According to a recent release of the Crop Reporting Board, the fifth largest acrease of flue-cured tobacco on record is in prospect in 1944. As of March 1 growers' intentions were to plant 996,300 acres, which is an increase of about 18 percent over the 846,400 acres harvested in 1943. Such an increase with a per-acre yield equal to the 5-year average (1938-42), would produce a crop of 946 million pounds, about 20 percent greater than the estimated 791 million-pound-crop grown in 1943. Preliminary estimates place the 1944 flue-cured allotments at 1,096,000 acres. If either the indicated acreage or a normal proportion of the allotted acreage is planted this year and average yields are obtained, production will be the second largest on record, being exceeded only by 1939 when 1,269,900 acres of flue-cured were harvested with a yield of 1,170,900,000 pounds. In 1939 tobacco marketing quotas were not in effect.

The unusually strong demand for practically all qualities of flue-cured leaf during the past two seasons resulting in the highest average prices since 1919, will offer considerable encouragement to farmers to plant their full allotments in 1944, although there is less labor on tobacco farms than in former years. Last year growers harvested about 94 percent of the total allotments. Land suitable for tobacco is adequate and it is expected that sufficient commercial fertilizers, with the possible exception of potash, will be available to farmers generally.

As has been previously reported in this publication marketing quotas will be in effect during the 1944-45 season and individual farm acreage allotments have been increased 20 percent over 1943.

Stocks Below Last Year; Leaf Consumption at Record Level

As a result of the high level of domestic manufacturing, substantial lend-lease shipments and other exports, stocks of flue-cured leaf are below those of a year ago. On July 1, 1944, stocks held by manufacturers and dealers are now expected to be about 1,244 million pounds (farm-sales weight), 135 million pounds below July 1, 1943. However, a considerable quantity, about 130 million pounds, will consist of leaf held by or for the accounts of the Commodity Credit Corporation. Of the total stocks on July 1, 1944, more than 1,100 million pounds will be available for domestic manufacturing. Each year since July 1941 stocks of flue-cured have been lower than on the same date of the previous year. Additions of new-crop tobacco to manufacturers' and dealers' stocks through purchases of the 1943 production were considerably less than the season's disappearance.

Despite the fact that consumption of flue-cured leaf is at the highest level on record, the ratio of the stocks to disappearance is only slightly

less favorable than a year ago. Stocks on July 1, 1943 were about 149 percent of the estimated 1943-44 season's disappearance, as compared with 164 percent a year earlier.

A similar situation exists in regard to the total supply of leaf available to dealers and manufacturers. Supplies of flue-cured leaf for the 1943-44 season represent 234 percent of estimated disappearance, as compared with 259 percent a year earlier. A 1944 crop of 946 million pounds of flue-cured, together with an estimated carry-over of 1,244 million pounds on July 1, 1944, would bring the total supply of this tobacco to 2,190 million pounds, an increase of about 21 million over that for the current crop year. Likewise, with a similar increase in production of burley and Maryland, cigarette leaf available for domestic manufacturing and export next season would probably be somewhat larger than for the present season.

Cigarette Consumption Continues at High Level

The major factors in the strong demand for flue-cured tobacco last season were the high level of domestic manufacturing and consumption of cigarettes along with the high level of consumer incomes. In the aggregate and on a per capita basis, an all-time consumption record was set in 1943. During the calendar year domestic cigarette consumption, as indicated by tax-paid withdrawals, totaled somewhat more than 257 billion, an increase of 9 percent over the 235.8 billion withdrawn in 1942. But the actual increase over 1942 was considerably greater than indicated by sales of revenue stamps, because of the large volume of tax-free cigarettes shipped to the armed forces outside the United States. During December 1943, the 37th consecutive month to show an increase over the same month a year earlier, 22.8 billion tax-paid cigarettes were withdrawn. But the 37-month period of continuous increase came to an end in January when withdrawals declined to 20.1 billions, 1.25 percent under January 1943. It is possible however, that if the large volume of tax-free cigarettes shipped abroad were included in the calculations, January also would have shown an increase over the same month last year. For the first seven months of the fiscal year beginning July 1, 1943, approximately 159.8 billion tax-paid cigarettes were withdrawn, 8.6 percent above the 147.2 billion withdrawn during the same period a year earlier.

Although consumption of cigarettes has increased greatly under war conditions, the upward trend is of long duration. The estimated 1943 per capita consumption in this country is 1,877 cigarettes which is nearly 59 times the utilization in 1900. Although influenced greatly by income, the pattern of consumption in othercountries of the Western world has followed somewhat the same course as in the United States. In terms of leaf-tobacco equivalent the per capita United States cigarette consumption for 1943 and 1900 was 5.4 pounds and 0.1 pounds respectively.

Table 1.- Flue-cured tobacco: Domestic supplies, disappearance, and season average price, average 1935-39, annual 1940-43 1/

Year	Production	Stocks, July 1	Total supply	Disappearance, year beginning July	Average price per pound
	Mil. lb.	Mil. lb.	Mil. lb.	Mil. lb.	Ct.
Average 1935-39 ...	863.6	881.6	1,745.2	732.2	20.5
1940	759.9	1,409.7	2,169.6	576.7	16.4
1941	649.5	1,592.9	2,242.4	783.0	28.1
1942	811.7	1,459.5	2,271.2	2/ 877.0	38.4
1943	3/ 790.9	1,378.8	3/ 2,169.7	4/ 926.0	3/ 39.8

1/ Farm-sales-weight equivalent.
2/ Owing to a change in the method of reporting Commodity Credit Corporation holdings, the 1942-43 season disappearance figure does not agree mathematically with the difference between the supply as of July 1, 1943 and stocks as of the same date. The above estimate is made by the Tobacco Branch of the Office of Distribution, War Food Administration, and an explanation of its derivation is to be published by that agency in its forthcoming Flue-cured Market Review for the 1943-44 season. (See also the April 1, 1943 stocks report of the War Food Administration).
3/ Preliminary.
4/ Estimated.

BURLEY, TYPE 31

Prices and Returns to Burley Producers Highest on Record

Sales of the 1943 crop of burley began December 6 with unusually strong demand for practically all grades of leaf. When sales were completed on March 24, marketings amounted to approximately 395 million pounds at an average price of 45.5 cents per pound, 3.7 cents above last year and the highest price on record. Prices of the 1943 crop of burley also established new records for many individual grades. Cash farm income from this season's crop is the largest on record, preliminarily estimated at about 180 million dollars, 36 million over 1942, the previous peak. Reflecting the high level of cigarette consumption, all grades suitable for cigarette manufacturing have sold at ceiling prices. A few lots of inferior grades, however, sold below established ceiling prices. Burley was the only major type of tobacco to show an increase in production (16 percent) in 1943 over 1942.

Stocks Below Last Year; Disappearance at Record Level

Largely as a result of the high level of domestic manufacturing of cigarettes, stocks of burley tobacco are below last year. Stocks held by

manufacturers and dealers on October 1, 1943, totaled 686 million pounds, and were 9.2 percent less than a year earlier. Disappearance during the 12-month period ended September 30, 1943, of 412.8 million pounds, materially exceeded the 1942 production. The substantial excess of estimated 1943-44 disappearance (425 million pounds) over indicated 1943 production will again reduce stocks as of the end of the season, possibly to 646 million pounds or less. On October 1 of last year stocks of burley were approximately 161 percent of estimated disappearance for the current season as compared with 183 percent a year earlier.

Because of the large 1943 crop, the situation with regard to the total supply of burley was somewhat more favorable than that of manufacturer's inventories. For the season as a whole the supply of leaf available for domestic manufacturing, export, and carry-over, represented 252 percent of estimated disappearance, compared with 266 percent in 1942 and 335 in 1940. But the supply of leaf in 1940 was exceptionally large in relation to consumption.

Exports of cigarette tobaccos, which increased substantially during the past 12 months, consisted largely of flue-cured with very little burley. Cigarettes account for more than 60 percent of the entire consumption of burley in normal years. The demand for burley to be used in plug chewing has increased under war conditions, but burley used in smoking tobacco has declined. About 50 percent of the total leaf used in smoking mixtures is burley and the decline in consumption of this product will have considerable effect on this type of tobacco. Although exports of burley tobacco have always represented a small proportion of production and have decreased during the war, domestic demand for the leaf has been decidedly upward. Inasmuch as burley and flue-cured have similar domestic uses the pattern of consumption of burley has tended to follow that of flue-cured.

Largely as a result of the increased popularity of cigarettes, consumption of burley has increased in recent years both in the aggregate and on a per capita basis. In 1931 domestic consumption of burley leaf was about 1.9 pounds per capita as compared with an estimated 3.2 pounds in 1943 (farm-sales-weight basis). During the same period per capita consumption of cigarettes increased from 2.58 pounds to 5.53 pounds.

March Intentions to Plant Point to Possible Record Crop in 1944

According to the Crop Reporting Board report of Prospective Plantings for 1944, the largest crop of burley tobacco on record may be in prospect for 1944. Growers' intentions as of March 1 were to plant 478,000 acres, an increase of 21 percent over last year's harvested acreage. Present 1944 allotments for Burley tobacco total about 569,000 acres. The intended acreage, with the 5-year (1938-42) average yield would produce a crop of 456 million pounds, and would be the largest burley crop on record. It would exceed the previous record production of 424.7 million pounds produced in 1931 by about 7 percent, and the 1943 crop by approximately 18 percent. If the high 1940 yield of 1,024 pounds were obtained on the indicated 1944 acreage, the crop would be 489 million pounds, or about 104 million pounds greater than the relatively large crop of 1943, and 64 million pounds above the 1943-44 estimated season's disappearance.

As stated in a previous issue, burley marketing quotas will be in effect during the 1944-45 season and individual farm acreage allotments have been increased 20 percent over 1943.

Since the March intentions to plant survey was made by the Crop Reporting Board, legislation has been enacted to provide that the allotment established for any farm having a Burley allotment in 1943 shall not be less than one acre or 25 percent of the cropland, which ever is smaller. The increase which will result from this provision may add as much as 20 thousand acres to the present 1944 total allotment of 569,000 acres. Although a large increase in acreage over last year is a probability, burley growers tend to underplant allotments to a greater extent than producers of flue-cured. For 1943, about 468,000 acres were alloted and it is estimated that only 395,000 acres were harvested. It is probable, however, that a larger percentage of allotments will be harvested in 1944 than in 1943. During the past four seasons, harvested acreage of burley has averaged about 90 percent of allotments.

In general the outlook for burley production in 1944 is favorable. With normal weather, the increase in acreage allotments and the unusually strong demand for the leaf this season, should result in the largest crop on record. Adequate plant beds were prepared to assure farmers of sufficient plants at the proper time, and mild weather has favored preparation of the land. However, a shortage of materials suitable for plant bed covering has been reported. Otherwise, a generally satisfactory situation prevails with regard to plants for the 1944 crop.

Table 2.- Burley tobacco: Domestic supplies, disappearance, and average price, average 1935-39, annual 1940-43 1/

Year	Production	Stocks Oct. 1	Total supply	Disappearance, year beginning Oct.	Average price per pound
	Mil. lb.	Mil. lb.	Mil. lb.	Mil. lb.	Cents
Average 1935-39	315.9	673.6	989.5	317.5	22.2
1940	375.3	702.3	1,137.6	339.5	16.2
1941	336.8	798.1	1,134.9	379.6	29.2
1942	343.5	755.3	1,098.8	412.8	41.8
1943	2/ 385.4	686.0	2/ 1,071.4	3/ 425.0	3/ 45.5

1/ Farm-sales-weight equivalent.
2/ Preliminary.
3/ Estimated.

MARYLAND, TYPE 32

Stocks Below a Year Ago;
Consumption at Record Level

As a result of the exceptionally high level of domestic manufacturing of cigarettes, stocks of Maryland tobaccos like those of flue-cured and burley are below stocks of a year ago. On January 1, 1944, stocks held by manufacturers and dealers totaled 43.8 million pounds (farm-sales weight), about 3 million pounds below January 1, 1943. Because little Maryland leaf has been exported since the beginning of the present world conflict, practically all of the stocks reported on January 1, 1944, will be available for domestic consumption. Its use is primarily in the manufacture of cigarettes, and the demand for the leaf has increased along with the rise in the demand for that product. Additions to manufacturer's stocks through purchases of the 1942 crop were somewhat less than 1943 consumption. Disappearance of the leaf during 1943 was about 67 percent of stocks (as reported at the beginning of the season), compared with 63 percent a year earlier.

Owing to the short 1943 crop and the high level of domestic consumption, the total supply of Maryland leaf on January 1, 1944, was approximately 61.4 million pounds. This was 14.4 million pounds below a year earlier. Assuming 1944 domestic consumption and exports to be 33 million pounds, the season's disappearance would be about 54 percent of the total supply (as of January 1), compared with 42 percent a year earlier. From the standpoint of both the demand for and the supply of Maryland leaf, a considerable expansion in acreage and production in 1944 is desirable. Although the labor situation is expected to be extremely tight this season in this area, the unusually strong demand for Maryland tobacco and the high prices paid last season will offer considerable encouragement to growers to plant at least a normal acreage in 1944. The intentions-to-plant report indicates that farmers as of March 1, planned to expand their 1944 acreage by 15 percent over that of 1943. Acreage harvested in 1943 was well below that of recent years, however.

Table 3.- Maryland tobacco: Domestic supplies, disappearance, and season average price, average 1935-39, annual 1940-43 1/

Year	Production (sold in the following year)	Stocks Jan. 1 of following year	Total supply for the following year	Disappearance during the following year	Season average farm price per pound
	Mil. lb.	Mil. lb.	Mil. lb.	Mil. lb.	Ct.
Average 1935-39	28.9	38.4	67.3	27.9	20.4
1940	32.6	43.2	75.8	30.8	33.0
1941	31.2	45.0	76.2	28.5	30.1
1942	28.1	47.7	75.8	2/ 32.0	2/ 56.5
1943 2/	17.6	43.8	61.4		

1/ Farm-sales-weight equivalent.
2/ Preliminary.

DARK TOBACCOS -- FIRE-CURED, TYPES 21-24, AND DARK AIR-CURED, TYPES 35-37

Demand Strong; Prices Well Above Last Year 1/

Like all other major types, the dark tobaccos sold so far this season have brought a price averaging well above the corresponding period last year. With a large percentage of the last season's production already sold, it is probable that for many individual types the 1943 crop will establish new record prices for practically all grades as well as an all-time high for season average price. Demand has been exceptionally strong for dark air-cured leaf. The principal factors contributing to the strong demand and large increases in prices for dark tobaccos this year over last are: (1) The relatively short 1943 crop of most types, (2) the relatively large utilization of leaf in the domestic manufacture of snuff, and plug chewing tobacco and twist, (3) the improved outlook for regular commercial export to Africa and the liberated countries, and (4) purchases of low-grade leaf by manufacturers under the Government diversion program for the production of nicotine sulphate and nicotine alkaloid.

Through March 31, 1944, sales of all fire-cured tobaccos (types 21-24) from the 1943 crop, calculated from the reports of the Tobacco Branch of the Office of Distribution, War Food Administration, amounted to approximately 57 million pounds at an average price of about 23 cents per pound. This compares with the season average price of 17.1 cents per pound received by growers for the 1942 crop and 14.1 cents for the 1941 crop. Virginia fire-cured (type 21) markets closed February 24 after selling one of the smallest crops on record. Because of dry weather throughout most of the growing season the quality of the crop was reported as inferior to last year's production, and yield per acre was below that of recent years. Total sales of type 21 amounted to 9,720,000 pounds at an average of 28 cents per pound, the highest average price on record. This compares with 17.5 cents per pound in 1942 and an average of 24 cents in 1919.

No tobacco of the 1943 crop of Virginia fire-cured was received by the Association, as all grade averages were well above advance prices, even though the latter were slightly higher than a year ago. Certain low grades

1/ Fire-cured markets opened and closed on the following dates:

Virginia fire-cured type 21, December 6-February 24
Eastern District type 22, January 10-March 31
Western District type 23, January 3-March 24
Henderson Stemming type 24, December 3-February 29

Dark air-cured markets opened and closed on the following dates:

One Sucker type 35, December 13-February 25
Green River type 36, December 1-March 2
Virginia sun-cured type 37, December 7-February 25

of the 1943 crop were reserved under the Government's byproducts diversion program for purchase by manufacturers of nicotine sulphate and nicotine alkaloid or by the Federal Surplus Commodities Corporation. Total sales of Virginia fire-cured under the freeze order totaled 57,590 pounds, at an average of 14.3 cents per pound, according to the reports of the War Food Administration.

The season's marketings of Eastern District fire-cured (type 22), through March 31, 1944, amounted to 35.5 million pounds at an average of 22.5 cents per pound, about 7 cents over the corresponding period last season. Purchases by the Eastern District Dark Fired Tobacco Grower's Association through March 22 amounted to 2 million pounds at an average of approximately 25.5 cents per pound. Through the same date purchases of type 22 leaf for insecticides totaled 3,798,700 pounds, about 11 percent of gross sales.

The season's sales of Western District fire-cured (type 23) totaled about 11.6 million pounds at an average of about 21 cents per pound. The Western Dark Fired Tobacco Growers' Association purchased 2.6 million pounds, or 23 percent of gross sales for diversion into nicotine production.

Sales of Henderson stemming (type 24) were completed for the season by February 29. Producers sales amounted to 27,450 pounds, at an average price of 22.4 cents per pound. This compares with 16 cents in 1919, the previous high. At one time Henderson stemming was one of the major types of dark tobaccos. In 1919 production amounted to 19.5 million pounds.

The 1943-44 season for dark air-cured tobaccos (types 35-37) came to an end March 2. Demand for the leaf was strong and prices for all grades were well maintained throughout the season. Growers received the highest prices on record for most individual grades, and sales of the 1943 crop established an all-time high average price. Of the three types of dark tobaccos, Virginia sun-cured sold for the highest average price, followed by Green River and One Sucker. Gross sales of all dark air-cured types combined amounted to almost 30 million pounds, 4.8 million below 1942-43 season. The average season price was 27.3 cents per pound, compared with 15.4 cents last season. The value of the 1943 crop of dark air-cured tobacco is preliminarily placed at about 8 million dollars.

Sales of One Sucker (type 35) amounted to 16,703,000 pounds, at an average of 24.9 cents per pound, about 9 cents above that received by growers for the 1942 crop, and the highest on record. The crop value is placed at about 4 million dollars. Demand for the leaf was strong and prices for practically all grades increased sharply as compared with last season. About 10 percent of total season's sales, or 1.6 million pounds, were diverted to byproducts.

The 1943 crop of Green River (type 36) also sold at the highest general average on record, and established new records for many individual grades. The 1943 crop was the smallest on record, and total sales amounted to only 11 million pounds, 26 percent under last season. With the small crop, the strong demand and a somewhat higher quality crop than the previous

season, the season average price of 29.5 cents for gross sales was more than twice as high as the 13.7 cents average received by growers last season. All grades showed price increases. Of the total sales, about 1,426,000 pounds, or 13 percent, were purchased for diversion into production of nicotine sulphate and nicotine alkaloid, at an average of about 15 cents per pound.

The 1943 crop of Virginia sun-cured tobacco (type 37) sold at the highest average price in its history — 34.9 cents per pound (gross sales) compared with 22.7 paid producers last season. The crop also established record prices for many grades. The value of the 1943 crop is estimated at about 765,000 dollars. Sales of 2.2 million pounds, was considerably below last year, and indicates the smallest production since 1933, according to reports of the War Food Administration.

Grades X5F, X5FV, X5D, X5M, X5G, and nondescript were reserved by order of the Administrator of the War Food Administration for purchase by the Surplus Commodities Corporation and manufacturers of insecticides. Sales for byproducts diversion totaled about 14,000 pounds at an average of 14.2 cents per pound.

Production Below 1942; Stocks Slightly Lower

Total domestic production of all types of dark tobaccos in 1943 is placed at about 101 million pounds, 8 percent below 1942 and 30 percent less than the average for the 5-year period, 1935-39. Stocks on hand at the beginning of the season (October 1, 1943) totaled 245 million pounds, 1.4 percent less than stocks on the same date last year. The 1943 crop, together with the carry-over of 245 million pounds, gives an available supply for the season of slightly less than 346 million pounds, 11 percent less than the 1935-39 average. However, during the 5-year period, 1935-39, there was a difinite surplus of all dark tobaccos. The trend in demand for and consumption of dark types of tobaccos grown in this country has been downward for a long period of time. The down trend in demand is largely the result of a decline in exports. The downward trend in production of leaf during recent years is the result of the combined efforts of Government and growers to bring supply into line with decreasing demand. These efforts have been rewarded with higher prices to growers. Even with domestic manufacturing at a relatively high level and some increase in exports, disappearance of dark leaf during the past two seasons has been only slightly greater than production. Furthermore, the current supply is considerably larger in relation to disappearance than for any of the major types of tobacco. In the past, when there were no controls, farmers have responded to higher leaf prices with increased acreage. The extremely high prices paid for dark tobaccos this season will likely result in an increase in total production in 1944. The March 1 survey of farmers' intentions to plant indicates little expansion in fire-cured types, but a 32 percent increase in the planned acreage for dark air-cured.

Although it is not possible to see the extent of the demand factors which are responsible for present level of prices, it is probable that the increase in consumption since 1941 does not represent a reversal of the long-term downward trend in demand for dark tobaccos. Furthermore, the Government's program of diverting low grades of dark tobaccos into the production of insecticides is a result of wartime necessity. It was undertaken by the Department of Agriculture to increase the supplies of domestically produced insecticides for agricultural purposes. The demand for nicotine sulphate and nicotine alkaloid has greatly increased under war conditions, and the production of these products is being encouraged by the Government in order to make possible their increased manufacture and sale under price ceilings. It is possible that dark tobaccos may no longer be used to any great extent in the production of these products after the war.

Domestic Consumption of Snuff and Chewing Tobacco at High Level

The principal trade outlet for the dark tobaccos produced in the United States is in the manufacture of snuff and chewing tobacco, the consumption of which has increased under war conditions. Tax-paid withdrawals of snuff, the principal product made from fire-cured types, has shown substantial increases over pre-war years. During the first 7 months of the fiscal year beginning June 30, 1943, domestic consumption, as indicated by tax-paid withdrawals, totaled 24.7 million pounds, 6.33 percent more than for the same period a year earlier. Furthermore, withdrawals of 3.8 million pounds during January 1944, was 5.5 percent above the same month of 1943. Production of chewing tobacco (plug and twist), the principal trade outlet for dark air-cured, continues at a relatively high level. Production of plug was 54.6 million pounds for the first 11 months of 1943, as compared with 50.2 million pounds during the corresponding period of 1942, an increase of 8.8 percent. During the same period production of twist increased 264,676 pounds, or 4.8 percent. Consumption of these products will probably continue at a relatively high rate for the remainder of the period of high industrial employment in war plants, but this does not appear to represent a reversal of the long-time downward trend in the use of chewing tobacco.

Table 4.- Dark tobaccos: Domestic supplies, disappearance, and season average price, average 1935-39, annual 1940-43 1/

Year	Production	Stocks Oct. 1	Total supply	Disappearance, year beginning Oct.	Average price per pound
	Mil. lb.	Mil. lb.	Mil. lb.	Mil. lb.	Ct.
			TOTAL ALL DARK TOBACCOS		
Fire-cured, types 21-24, and dark air-cured, types 35-37					
Average 1935-39	139.9	240.7	380.6	157.1	9.9
1940	150.1	207.2	357.3	99.0	9.0
1941	101.2	258.3	359.6	111.0	13.4
1942	105.2	248.6	353.8	2/ 108.8	16.4
1943 2/	100.9	245.0	345.9	---	---
			FIRE-CURED		
Total, types 21-24					
Average 1935-39	103.6	181.4	284.9	120.0	10.3
1940	107.6	141.6	249.2	65.3	9.5
1941	69.7	183.9	253.6	69.0	14.1
1942	70.0	184.6	254.6	2/ 74.8	17.1
1943 2/	68.5	179.8	248.3	---	---
			DARK AIR-CURED		
Total, types 35-37					
Average 1935-39	36.3	59.3	95.7	37.1	8.9
1940	42.5	65.6	108.1	33.7	7.7
1941	31.5	74.4	106.0	42.0	12.0
1942	35.2	64.0	99.2	2/ 34.0	15.1
1943 2/	32.4	65.2	97.6	---	---
One Sucker, type 35					
Average 1935-39	17.7	29.6	47.3	17.9	8.1
1940	21.9	31.9	53.8	18.1	7.5
1941	15.7	35.7	51.4	19.9	11.4
1942	17.9	31.5	49.3	2/ 14.9	15.3
1943 2/	17.9	34.4	52.3	---	---
Green River, type 36					
Average 1935-39	15.8	27.0	42.8	16.6	9.2
1940	17.5	30.1	47.6	12.6	7.6
1941	13.6	35.0	48.6	18.8	11.7
1942	14.9	29.8	44.7	2/ 16.7	13.7
1943 2/	12.5	28.0	40.5	---	---
Va. sun-cured, type 37					
Average 1935-39	2.8	2.8	5.6	2.6	11.9
1940	3.1	3.6	6.7	3.0	9.3
1941	2.2	3.7	6.0	3.3	17.9
1942	2.4	2.7	5.2	2/ 2.3	22.7
1943 2/	2.0	2.9	4.9	---	---

1/ Farm-sales-weight equivalent. 2/ Preliminary.

CIGAR TOBACCO, TYPES 41-62

Smaller 1943 Acreage and Production;
Stocks and Supplies Lower

The 1943 harvested acreage of cigar tobacco in this country is estimated at about 80,600 acres, 10 percent below the acreage harvested in 1942. In general the weather was favorable in most areas except Pennsylvania and the per acre yield of 1,344 pounds was greater by about 6 percent than the average for the 5-year period 1935-39. The estimated 1943 production of all cigar tobaccos in the continental United States is about 108.3 million pounds, 9 percent less than the 118.6 million pound crop grown in 1942. This was because of a decline of 11 percent in the filler class and 9 percent in the binder class. But cigar-wrapper production increased by about 6 percent over 1942.

Stocks of domestic cigar tobacco held by manufacturers and dealers on October 1, 1943, were 293 million pounds -- 24 million less than a year earlier; and the total supply for the season was the smallest in several years Of the separate classes, stocks were smaller on October 1, 1943, than on the same date a year earlier for cigar filler and binder, and supplies for the season were slightly lower than in the preceding year. In the case of wrappe the increase in production in 1943 resulted in a slight rise in total supply.

Although stocks are below last year for most all cigar classes and types, the supply situation is not particularly unfavorable for the industry. Disappearance of leaf expressed as a percentage of the total supply has increased only slightly since the beginning of the war, and is below the average for the 10-year period 1920-29. Disappearance during the 1942-43 season was only about one-third of the supply available for the season, as compared with 30 percent a year earlier. The estimated 1943 production of cigar leaf in the United States is 24 percent less than 1942 disappearance of 143 million pounds, whereas the 1942 crop was 10 percent less than 1941 disappearance.

Stocks of foreign-grown cigar leaf held by manufacturers and dealers in the United States on October 1, 1943, totaled approximately 25 million pounds (farm-sales-weight), an increase of about 2 million pounds over 1942. Stocks of Cuban (Havana) leaf were much larger, having increased by almost 3.3 million pounds over October 1, 1942. Under the trade agreement between the United States and Cuba, a quota of 22 million pounds of Havana filler may be imported each calendar year into the United States at a 14-cent-per-pound reciprocity treaty rate. All imports of Havana filler above this quota are subject to the full tariff rate of 28 cents per pound. Withdrawal entries for Cuban tobacco presented by manufacturers at customs bonded warehouses on January 1, 1944, amounted to approximately 18.5 million pounds. This was about 85 percent of the total that may enter the country at the low 14-cent rate during 1944. It is probable that the entire 22 million pounds were entered by February 1, 1944. Holdings of Sumatra stocks were slightly lower on October 1, and Philippine stocks in this country dropped 62 percent during the 12-month period.

Consumption of Cigars Continues to Decline; Scrap Chewing Tobacco Increases

Tax-paid withdrawals of all classes of cigars during the calendar year 1943 amounted to 5.2 billion, a decline of almost 16 percent from the 6.2 billion withdrawn during 1942. During the first 8 months of the fiscal year ending June 30, 1944, withdrawals totaled 3.2 billion, a decline of 870 million, or almost 21 percent below the corresponding period of the previous year. During the calendar year 1942, cigar withdrawals reached the highest level since 1929. Internal Revenue figures indicate that during the past 12 months there has been a definite trend toward higher-priced cigars. A comparison between the different classes on a calendar year basis is difficult since the Revenue Act of 1942 changed the basis of classifying cigars. However, the available data indicate that the decrease was largely in the lower-priced groups. For each of the 3 months for which comparable data by classes are available since the 1942 Revenue Act became effective, Classes A, B, and C have shown declines from the same months of the previous year. During January 1944, these classes showed declines of 54 percent, 76 percent, and 24 percent respectively. On the other hand, Classes E, F, and G, all higher-priced cigars, showed substantial increases.

Another trade outlet for cigar leaf is in scrap chewing tobacco, the consumption of which has increased under war conditions. Production of scrap chewing is running above 1942. For the first 11 months of the calendar year 1943, production, as reported by the Bureau of Internal Revenue, amounted to 47,111,978 pounds, an increase of 2.84 percent over the 45,813,134 pounds produced in the corresponding period a year earlier. This percentage increas is considerably less than the 12.42 percent increase reported for the first 11 months of 1942 as compared with the same period of 1941.

Prices Higher than Last Year; Summary of Price Regulations and Freeze Orders

The demand for all types of cigar tobacco has been exceptionally stron this season, and prices received by growers are substantially higher than a year ago. With the exception of type 41 sales of the 1943 crop are almost completed. Practically all sales have been at or near ceiling prices established by the Office of Price Administration. Demand has been exceptionally strong for cigar binders, although filler and wrapper types (except type 61) have also shown substantial price increases over 1942.

The Office of Price Administration established ceiling prices on practically all types of cigar tobaccos grown in 1943. Regulation 440, effective July 20, 1943, placed maximum prices on Georgia and Florida shade-grown tobacco, type 62. Under this regulation the weighted average purchase price for unsized and unsorted tobacco during each 6 weeks period could not exceed $1.23 per pound. The regulation also established maximum prices for sized and sorted tobaccos of type 62. Certain types of the 1943 crop of cigar filler and binder tobaccos were brought under maximum price regulation on

November 13. This regulation (No. 494) provided for ceiling prices on types 41-44 grown in Pennsylvania and Ohio, and types 51-55 grown in Connecticut, Massachusetts, New York, and Wisconsin. Specific cents per pound maximum prices were established at the grower level for sales of each of the listed types, and except for types 52 and 53, for specific industry grades for each type. (For further information on price regulations see the Tobacco Situation for January 1943.)

Because of the unusually strong demand for the leaf, it was deemed desirable for the War Food Administration to freeze all future contract purchases of most domestic cigar filler and binder types before the crops were harvested. The specific purpose of the freeze order, as stated by the Administrator, was to halt speculative buying of tobacco while it was still growing in the field. These types of tobacco are usually purchased after they have been harvested and cured and future-contract buying threatened to disrupt distribution of the crop.

Maximum Prices Established for 1943 Crop of Connecticut Shade (Type 61)

Effective February 29, 1944, the Office of Price Administration issued Maximum Price Regulation No. 517, which placed ceiling prices on Connecticut shade-grown (type 61) tobacco at the same levels established for the 1942 crop. As was the case with the 1942 crop, the prices cover the 25 grades customarily recognized by the industry for this tobacco. This type is produced by approximately 45 growers in the Connecticut River Valley in Connecticut and Massachusetts. Under this order the prices were designed to produce a weighted average selling price (to grower-packers and packers) of $2.40 per pound (packed weight), which is the same as that reflected in the ceiling prices for the 1942 crop. This is an increase of 20 percent over the season average price for the 1941 crop. The regulation is similar to that of last year, but provides for a new method of figuring ceiling prices for assorted and unsorted tobacco. It provides that sellers may use as their ceiling price the weighted average of the maximum prices of the grades included in the unassorted or unsized bundles, less 25 cents per pound. This provision was included in the new regulation, according to a release of the Office of War Information (March 1, 1944), because the shortage of labor in sorting operations would result in a larger percentage of better grades falling into unsorted bundles. Under the regulation jobbers have the same method of figuring their maximum prices as were used for the 1942 crop.

It was stated by the Office of Price Administration in issuing the order that while the cost of production for the 1943 crop was somewhat higher than for the 1942 crop, the increased cost was offset by an increase in per acre yield, (906 pounds in 1943 as compared with 733 pounds in 1942.)

Table 5.- Cigar tobaccos: Production, stocks, supply, and price, United States, 1920-43

Year beginning Oct.	Production	Stocks, Oct. 1 (farm-sales weight) 1/	Supply	Disappearance	Disappearance as a percentage of supply	Season average farm price per pound
	Million pounds	Million pounds	Million pounds	Million pounds	Percent	Cents
1920	223.6	360.9	584.5	215.3	36.8	22.2
1921	212.9	369.2	582.1	166.4	28.6	17.6
1922	172.6	415.7	588.3	157.8	26.8	21.5
1923	192.2	430.5	622.7	174.7	28.1	24.6
1924	180.1	448.0	628.1	202.3	32.2	19.2
1925	194.4	425.8	620.2	199.9	32.2	15.8
1926	146.5	420.3	566.8	210.6	37.2	19.1
1927	139.0	356.2	495.2	172.3	34.8	21.8
1928	162.9	322.9	485.8	163.6	33.7	20.7
1929	170.8	322.2	493.0	179.3	36.4	20.1
1930	180.8	313.7	494.5	136.5	27.6	15.9
1931	187.7	358.0	545.7	118.3	21.7	10.2
1932	150.0	427.4	577.4	163.7	28.4	7.8
1933	78.4	413.7	492.1	99.8	20.3	11.0
1934	75.1	392.3	467.4	105.4	22.6	16.6
1935	91.5	362.0	453.5	128.1	28.2	16.8
1936	104.4	325.4	429.8	127.7	29.7	18.9
1937	110.6	302.1	412.7	116.1	28.1	17.7
1938	114.3	296.6	410.9	141.5	34.4	15.3
1939	137.7	269.4	407.1	108.4	26.6	18.6
1940	144.0	298.7	442.7	137.3	31.0	17.4
1941	143.2	305.4	448.6	131.3	29.3	20.4
1942	118.6	317.3	435.9	2/ 143.3	2/ 32.9	23.5
1943	2/ 108.3	292.6	2/ 400.9			

Compiled from data of the War Food Administration. Stocks prior to 1929 compiled from reports of the Bureau of the Census, Department of Commerce.
1/ Stocks of continental types held by dealers and manufacturers. Complete data on farm stocks which are significant in some years and for some cigar types are not available. Stocks for types 45 and 62 are as of July 1.
2/ Preliminary.

Table 6.- Cigar tobaccos: Domestic supplies, disappearance, and season average price, average 1935-39, annual 1940-43 1/

Type and year	Production	Stocks, Oct. 1 2/	Total supply	Disappearance year beginning Oct.	Average price per pound
	Million pounds	Million pounds	Million pounds	Million pounds	Cents
Total filler, types 41-45 -					
Average 1935-39	53.6	154.5	208.1	56.8	11.0
1940	66.6	151.0	217.6	60.6	11.9
1941	71.4	157.0	228.4	61.7	12.4
1942	53.6	166.7	220.3	3/ 66.7	3/ 13.2
1943 3/	47.6	153.6	201.2		
Pennsylvania seedleaf, type 41 -					
Average 1935-39	37.6	99.1	136.7	36.3	12.0
1940	50.1	106.0	156.1	41.8	13.3
1941	57.7	114.3	172.0	49.1	13.2
1942	41.6	122.9	164.5	3/ 54.9	3/ 13.7
1943 3/	39.2	109.6	148.8		
Miami Valley, types 42-44 -					
Average 1935-39	15.2	53.5	68.7	19.8	8.5
1940	16.5	42.6	59.1	16.4	7.7
1941	13.7	42.7	56.4	12.6	9.3
1942	12.0	43.8	55.8	3/ 11.8	3/ 11.5
1943 3/	8.4	44.0	52.4		
Total binder, types 51-56 4/					
Average 1935-39	48.9	146.4	195.3	58.6	13.7
1940	67.9	136.0	203.9	67.2	14.5
1941	61.6	136.7	198.3	60.4	16.9
1942	55.7	137.9	193.6	3/ 67.0	3/ 20.3
1943 3/	50.8	126.6	177.4		
Connecticut Valley broadleaf, type 51 -					
Average 1935-39	11.8	33.0	44.8	13.4	18.4
1940	12.3	27.5	39.8	16.5	21.0
1941	12.8	23.3	36.1	10.0	22.0
1942	10.4	26.1	36.5	3/ 14.2	3/ 26.0
1943 3/	10.0	22.3	32.3		
Connecticut Valley Havana seed, type 52 -					
Average 1935-39	9.7	25.9	35.6	10.9	18.7
1940	13.8	24.5	38.3	12.8	21.7
1941	13.4	25.5	38.9	9.3	24.0
1942	12.7	29.6	42.3	3/ 13.3	3/ 26.3
1943 3/	11.3	29.0	40.3		

Continued -

Table 6.- Cigar tobaccos: Domestic supplies, disappearance, and season average price, average 1935-39, annual 1940-43 1/ - Continued

Type and year	Production	Stocks, Oct. 1 2/	Total supply	Disappearance year beginning Oct.	Average price per pound
	Million pounds	Million pounds	Million pounds	Million pounds	Cents
New York and Pennsylvania Havana seed, type 53 -					
Average 1935-39	1.3	2.2	3.5	1.1	10.6
1940	2.0	3.2	5.2	2.1	12.0
1941	2.2	3.1	5.3	2.4	12.9
1942	1.9	2.9	4.8	3/ 3.0	3/ 13.5
1943 3/	1.3	1.8	3.1		
Southern Wisconsin, type 54 -					
Average 1935-39	14.6	53.1	67.7	20.6	8.8
1940	20.4	43.6	64.0	24.6	8.5
1941	15.4	39.4	54.8	19.2	9.6
1942	13.8	35.6	49.4	3/ 13.3	3/ 16.2
1943 3/	13.4	36.1	49.5		
Northern Wisconsin, type 55 -					
Average 1935-39	11.2	32.2	43.4	12.3	11.0
1940	17.6	36.0	53.6	9.9	11.7
1941	16.9	43.7	60.6	18.6	14.6
1942	16.1	42.0	58.1	3/ 21.8	3/ 16.4
1943 3/	14.6	36.3	50.9		
Georgia and Florida sun-grown, type 56 4/					
1940	1.8	1.2	3.0	1.3	13.4
1941	.9	1.7	2.6	1.0	14.5
1942	.8	1.6	2.4	3/ 1.3	3/ 17.4
1943 3/	.2	1.1	1.3		
Total wrapper, types 61-62 -					
Average 1935-39	9.2	10.1	19.3	9.0	76.2
1940	9.5	12.9	22.4	10.7	75.8
1941	10.1	11.7	21.8	9.1	98.4
1942	9.2	12.7	21.9	3/ 9.6	3/115.8
1943 3/	9.8	12.3	22.1		
Connecticut Valley shade-grown, type 61 -					
Average 1935-39	6.5	7.3	13.8	6.3	78.8
1940	5.5	9.8	15.3	7.4	80.0
1941	6.4	7.9	14.3	6.3	113.0
1942	5.6	8.0	13.6	3/ 6.0	3/130.0
1943 3/	6.3	7.6	13.9		
Georgia-Florida shade-grown, type 62 -					
Average 1935-39	2.7	2.8	5.5	2.7	69.9
1940	4.0	3.1	7.1	3.3	70.0
1941	3.7	3.8	7.5	2.8	73.0
1942	3.6	4.7	8.3	3/ 3.6	3/ 97.0
1943 3/	3.5	4.7	8.2		

Continued -

Table 6.- Cigar tobaccos: Domestic supplies, disappearance, and season average price, average 1935-39, annual 1940-43 1/ - Continued

1/ Farm-sales weight. Rounded type figures do not check, in all cases, to those previously published because of rounding to add to the total for the class. In no case is the difference more than one point.
2/ Stocks held on farms not included; stocks for types 45 and 62 are as of July 1.
3/ Preliminary.
4/ From 1936 to 1939 there was a gradual shift in the relative proportion of type 45 (filler) and type 56 (binder). During this period the approximate distribution of production between the two types was as follows:

1936,	type 45	560,000 pounds
	type 56	200,000 pounds
1937,	type 45	804,000 pounds
	type 56	428,000 pounds
1938,	type 45	940,000 pounds
	type 56	600,000 pounds
1939,	type 45	700,000 pounds
	type 56	644,000 pounds

(See U.S.D.A. Cir. No. 249)

Beginning in 1940 the whole crop was classed as type 56. Stocks for any given year were divided between binder and filler in proportion to average production for the 2 preceding years.

Table 7.- Stocks of foreign-grown cigar, cigarette, and smoking tobacco, by types, as reported combining unstemmed and stemmed, owned by dealers and manufacturers in the United States, quarterly, 1938-43

Year and type	Jan. 1	Apr. 1	July 1	Oct. 1
	1,000 lb.	1,000 lb.	1,000 lb.	1,000 lb.
Total foreign-grown cigar leaf:				
1938	9,740	9,947	10,235	10,509
1939	10,418	10,571	11,350	12,577
1940	14,637	16,252	17,194	15,942
1941	15,876	17,241	19,850	19,225
1942	19,311	18,911	19,695	21,411
1943	19,939	19,636	22,546	25,038
Cuba (Havana), type 81:				
1938	6,248	6,266	6,647	6,772
1939	5,987	6,289	6,418	6,633
1940	6,495	6,810	6,942	7,156
1941	7,139	8,140	9,215	9,800
1942	9,539	10,107	11,899	13,193
1943	12,677	13,590	16,108	18,818
Sumatra and Java, type 82:				
1938	1,671	1,404	1,672	2,077
1939	2,247	1,879	2,494	3,021
1940	2,170	1,720	3,016	2,659
1941	2,435	3,362	5,313	5,036
1942	5,913	6,212	5,954	6,608
1943	6,027	5,134	5,658	5,383
Philippine Islands (Manila), type 83:				
1938	1,807	2,263	1,898	1,646
1939	2,181	2,245	2,280	2,913
1940	5,969	7,654	7,164	6,054
1941	6,197	5,712	5,199	4,236
1942	3,262	2,356	1,608	1,195
1943	864	635	539	528
Other foreign-grown cigar leaf, type 84:				
1938	14	14	18	14
1939	3	158	158	10
1940	3	68	72	73
1941	105	27	123	153
1942	597	236	234	415
1943	381	277	241	309
Total foreign-grown cigarette and smoking tobacco, type 90:				
1938	70,366	92,396	82,603	70,228
1939	86,239	108,128	101,530	92,655
1940	116,574	118,528	112,420	106,257
1941	101,733	98,583	108,802	99,487
1942	90,621	80,858	78,435	56,146
1943	76,792	67,989	57,494	56,390

Compiled from quarterly stocks reports of the Food Distribution Administration.

Table 8.- Flue-cured tobacco: Production, stocks, supply, disappearance, and price, United States, 1920-43 1/

Year beginning July	Production	Stocks, July 1	Total supply	Disappearance, year beginning July 1: Actual	Disappearance, year beginning July 1: As a percentage of stocks	Disappearance, year beginning July 1: As a percentage of supply	Season average farm price per pound
	Mil. lbs.	Mil. lbs.	Mil. lbs.	Mil. lbs.	Pct.	Pct.	Cts.
1920	616.0	352.5	968.5	410.7	116.5	42.4	21.5
1921	358.8	557.8	916.6	403.3	72.3	44.0	21.9
1922	415.4	513.3	928.7	421.0	82.0	45.3	27.2
1923	580.7	507.7	1,088.4	542.8	106.9	49.9	20.8
1924	437.3	545.6	982.9	456.5	83.7	46.4	21.6
1925	575.1	526.4	1,101.5	577.8	109.8	52.5	20.0
1926	560.1	523.7	1,083.8	544.9	104.0	50.3	24.9
1927	718.8	538.9	1,257.7	599.8	111.3	47.7	20.5
1928	739.1	657.9	1,397.0	708.2	107.6	50.7	17.3
1929	750.0	688.8	1,438.8	735.4	106.8	51.1	18.0
1930	865.2	703.4	1,568.6	774.1	110.1	49.3	12.0
1931	669.5	794.5	1,464.0	597.0	75.1	40.8	8.4
1932	373.7	867.0	1,240.7	564.9	65.2	45.5	11.6
1933	733.4	675.8	1,409.2	646.2	95.6	45.9	15.3
1934	557.8	763.0	1,320.8	568.2	74.5	43.0	27.2
1935	811.2	752.6	1,563.8	692.5	92.0	44.3	30.0
1936	682.9	871.3	1,554.2	671.0	77.0	43.2	22.2
1937	866.3	883.2	1,749.5	795.1	90.0	45.4	23.0
1938	786.8	954.5	1,741.3	795.0	83.3	45.7	22.2
1939	1,170.9	946.3	2,117.2	707.5	74.8	33.4	14.9
1940	759.9	1,409.7	2,169.6	576.7	40.9	26.6	16.4
1941	649.5	1,592.9	2,242.4	782.9	49.1	34.9	28.1
1942	811.7	1,459.5	2,271.2	2/877.0	60.0	38.6	38.4
1943	3/790.9	1,378.8	3/2,169.7	4/926.0	66.4	42.4	4/39.8

1/ Farm-sales-weight equivalent.
2/ Due to a change in the method of reporting stocks held by the Commodity Credit Corporation, this figure on disappearance does not agree mathematically with the stocks figure, as of July 1, 1943.
3/ Preliminary.
4/ Estimated.

Table 9.- Burley tobacco: Production, stocks, supply, disappearance, and price, United States, 1920-43 1/

Year beginning Oct.	Production	Stocks, Oct. 1	Total supply	Disappearance, year beginning Oct. 1: Actual	Disappearance, year beginning Oct. 1: As a percentage of stocks	Disappearance, year beginning Oct. 1: As a percentage of supply	Season average farm price per pound
	Million pounds	Million pounds	Million pounds	Million pounds	Percent	Percent	Cents
1920	287.7	323.6	611.3	224.6	69.4	36.7	13.5
1921	175.7	386.7	562.4	229.2	59.3	40.8	21.5
1922	276.4	333.2	609.6	209.7	62.9	34.4	26.8
1923	340.4	399.9	740.3	234.9	58.7	31.7	20.0
1924	295.8	505.4	801.2	266.4	52.7	33.3	20.1
1925	277.8	534.8	812.6	271.4	50.7	33.4	18.0
1926	288.8	541.2	830.0	304.2	56.2	36.7	13.1
1927	176.2	525.9	702.1	288.8	54.9	41.1	25.9
1928	269.1	413.3	682.4	288.2	69.7	42.2	30.5
1929	337.4	394.2	731.6	293.3	74.4	40.1	21.8
1930	349.2	438.3	787.5	277.3	63.3	35.2	15.5
1931	424.8	510.2	935.0	252.4	49.5	27.0	8.7
1932	303.7	682.6	986.3	266.0	39.0	27.0	12.5
1933	377.5	720.3	1,097.8	277.5	38.5	25.3	10.5
1934 2/	252.2	820.3	1,072.5	302.7	36.9	28.2	16.9
1935	222.1	769.8	991.9	310.2	40.3	31.3	19.1
1936	220.4	681.7	902.1	330.3	48.5	36.6	35.7
1937	402.2	571.8	974.0	313.2	54.8	32.2	20.1
1938	339.2	660.7	999.9	315.9	47.8	31.6	19.0
1939	395.4	684.1	1,079.5	317.2	46.4	29.4	17.3
1940	375.3	762.3	1,137.6	339.5	44.5	29.8	16.2
1941	336.8	798.1	1,134.9	379.6	47.6	33.4	29.2
1942	343.5	755.3	1,098.8	412.8	54.6	37.6	41.8
1943	3/385.4	686.0	3/1,071.4	4/425.0	4/62.0	4/39.7	4/45.5

1/ Farm-sales weight equivalent.
2/ Includes 18,000,000 pounds rendered unmarketable by growers, in compliance with Agricultural Adjustment Administration contracts.
3/ Preliminary.
4/ Estimated.

Table 10.- Per capita consumption of tobacco products in the United States 1900-41 1/

Calendar year	Large cigars	Small cigarettes	Cigars 2/	Cigarettes 2/	Chewing tobacco 3/	Smoking tobacco 3/	Snuff	Total
	Number	Number	Pounds	Pounds	Pounds	Pounds	Pounds	Pounds
1900 ...	72.9	32.2	1.30	.11	2.69	1.07	.21	5.38
1901 ...	76.9	31.7	1.37	.11	2.66	1.15	.22	5.51
1902 ...	82.1	35.8	1.45	.12	2.62	1.21	.23	5.63
1903 ...	84.1	38.7	1.51	.12	2.68	1.27	.24	5.82
1904 ...	83.0	40.0	1.50	.13	2.61	1.40	.25	5.89
1905 ...	84.5	42.5	1.54	.13	2.54	1.55	.26	6.02
1906 ...	86.8	52.1	1.60	.15	2.65	1.57	.27	6.24
1907 ...	83.6	60.3	1.59	.18	2.60	1.59	.26	6.22
1908 ...	78.0	64.5	1.47	.19	2.60	1.62	.28	6.16
1909 ...	77.2	76.9	1.48	.22	2.83	1.72	.33	6.58
1910 ...	76.6	93.6	1.49	.28	2.71	1.76	.34	6.58
1911 ...	77.7	107.7	1.55	.33	2.50	1.70	.31	6.39
1912 ...	77.4	138.7	1.54	.41	2.51	1.72	.33	6.51
1913 ...	79.5	162.5	1.61	.48	2.50	1.70	.34	6.63
1914 ...	74.4	166.5	1.55	.50	2.37	1.71	.31	6.44
1915 ...	70.6	178.4	1.47	.56	2.33	1.75	.32	6.43
1916 ...	75.1	247.3	1.58	.77	2.51	1.71	.34	6.91
1917 ...	79.1	336.4	1.65	1.08	2.60	1.67	.33	7.33
1918 ...	71.1	362.5	1.51	1.14	2.24	1.73	.35	6.97
1919 ...	68.9	425.8	1.48	1.34	2.18	1.51	.33	6.84
1920 ...	79.7	418.4	1.66	1.29	2.05	1.36	.34	6.70
1921 ...	63.9	467.9	1.36	1.42	1.81	1.42	.33	6.34
1922 ...	65.5	486.0	1.48	1.47	1.93	1.53	.35	6.76
1923 ...	65.8	574.9	1.51	1.73	1.93	1.39	.35	6.91
1924 ...	61.3	621.5	1.42	1.86	1.80	1.48	.34	6.90
1925 ...	59.7	689.6	1.37	2.05	1.77	1.44	.33	6.96
1926 ...	59.2	761.2	1.39	2.21	1.75	1.42	.32	7.09
1927 ...	57.8	815.8	1.35	2.38	1.64	1.33	.34	7.04
1928 ...	56.3	878.6	1.34	2.50	1.57	1.28	.34	7.03
1929 ...	56.2	977.1	1.31	2.77	1.50	1.27	.33	7.18
1930 ...	50.4	972.1	1.18	2.73	1.35	1.32	.33	6.91
1931 ...	45.4	914.7	1.08	2.58	1.18	1.46	.32	6.62
1932 ...	37.6	829.8	.89	2.32	.97	1.54	.29	6.01
1933 ...	36.6	890.0	.89	2.53	.91	1.52	.29	6.14
1934 ...	38.5	994.0	.95	2.87	.91	1.52	.29	6.54
1935 ...	39.5	1,057.9	.96	3.02	.90	1.49	.28	6.65
1936 ...	42.1	1,196.2	1.03	3.41	.91	1.51	.30	7.16
1937 ...	43.0	1,262.4	1.04	3.56	.89	1.44	.29	7.22
1938 ...	41.0	1,261.4	.97	3.56	.82	1.53	.29	7.17
1939 ...	42.1	1,317.8	.99	3.72	.78	1.53	.29	7.31
1940 ...	42.2	1,369.2	1.02	3.88	.76	1.54	.29	7.49
1941 4/	44.7	1,549.8	1.09	4.46	.78	1.46	.30	8.09
1942 4/	46.1	1,751.4	1.11	5.13	.82	1.26	.31	8.63
1943 5/	38.3	1,889.6	.92	5.54	.82	1.10	.32	8.70

Continued -

Table 10.- Per capita consumption of tobacco products in the United States 1900-41 1/ - Continued

Compiled from tax-paid withdrawals in the United States (including tax-paid withdrawals of tobacco products from the Philippine Islands and Puerto Rico) reported in monthly statements by the Commissioner of Internal Revenue, and July population.

1/ This table on per capita consumption of tobacco products includes several revisions. Calendar year data 1900-09 were derived by averaging adjacent fiscal-year data. Tax-paid withdrawals of products from the Philippine Islands and Puerto Rico are not available for these early years (1900-09); imports from the Philippine Islands and shipments from Puerto Rico have been included in lieu of withdrawals.

2/ Pounds of cigars and cigarettes represent unstemmed equivalent of tobacco used in the manufacture of these products. Both large and small cigars and large and small cigarettes are included. Revised conversion factors have been used in determining unstemmed equivalent of leaf used in the manufacture of cigars and cigarettes, 1900-21.

3/ Tax-paid withdrawals of manufactured tobacco have been separated into chewing tobacco and smoking tobacco in proportion to production of these two products.

4/ These years are not strictly comparable with earlier years as tax-free products sent to American forces in foreign countries are not included, and total population of the United States -- including the American forces in foreign countries -- has been used in determining per capita consumption.

5/ Preliminary.

Table 11.- Tobacco: Cash income, by States, calendar years 1941-43

State	1941	1942 1/	1943 1/	Change (1942-43)
	1,000 dollars	1,000 dollars	1,000 dollars	Percent
Mass.	3,021	2,576	4,320	+ 67.7
Conn.	9,764	7,146	16,291	+128.0
N. Y.	186	219	203	- 7.3
Pa.	6,777	7,428	5,780	- 22.2
Ohio	3,830	5,074	7,647	+ 50.7
Ind.	1,746	2,566	3,329	+ 29.7
Wis.	3,729	3,912	4,717	+ 20.6
Minn.	84	80	92	+ 15.0
Mo.	1,219	1,542	1,999	+ 29.6
Kans.	68	65	68	+ 4.6
Md.	10,771	9,401	15,558	+ 65.5
Va.	24,821	38,503	43,020	+ 11.7
W. Va.	584	686	861	+ 25.5
N. C.	134,946	224,005	236,938	+ 5.8
S. C.	17,276	35,798	37,169	+ 3.8
Ga.	11,630	18,439	28,537	+ 54.8
Fla.	4,087	6,655	8,179	+ 22.9
Ky.	68,008	86,430	104,963	+ 21.4
Tenn.	20,182	23,014	37,703	+ 63.8
Ala.	65	59	95	+ 61.0
U. S. ...	322,794	473,598	557,469	+ 17.7

1/ Preliminary.

Table 12.- Tobacco: Cash income, by classes and types; United States, 1941-43

Calendar year	Flue-cured, types 11-14	Light air-cured: Burley, type 31	Light air-cured: Maryland, type 32	Fire-cured, types 21-24	Dark air-cured, types 35-37	Cigar leaf, types 41-62	Total, types 11-62
	1,000 dollars	1,000 dollars	1,000 dollars	1,000 dollars	1,000 dollars	1,000 dollars	1,000 dollars
1941	183,332	87,490	10,771	9,694	3,806	27,701	322,794
1942 1/	311,336	112,514	9,401	9,942	4,072	26,333	473,598
1943 1/	339,432	146,795	15,558	12,087	5,041	38,556	557,469

1/ Preliminary.

Table 13.- Tax-paid withdrawals of tobacco products in the United States, calendar years 1942 and 1943, and July-January 1942-43 and 1943-44 1/

Products	Calendar year			July-Jan.		
	1942	1943	Change	1942-43	1943-44	Change
	Millions	Millions	Percent	Millions	Millions	Percent
Small cigarettes	235,840	257,741	+ 9.3	147,224	159,882	+ 8.6
Large cigarettes	3	6	2/+113.1	2	5	2/+143.1
Large cigars	6,207	5,228	- 9.8	3,759	2,915	- 22.5
Small cigars	133	128	- 3.8	75	72	- 4.0
Snuff 3/	41,161	43,180	+ 4.9	23,226	24,694	+ 6.3
Manufactured tobacco 3/	280,524	262,456	- 6.4	162,662	157,752	- 3.0

1/ Tax-paid withdrawals include products from Philippine Islands and Puerto Rico. After January 1942 tax-paid withdrawals from Philippine Islands are not included.
2/ Based on actual, not rounded figures.
3/ Thousand pounds.

Table 14.- Production of manufactured tobacco in the United States, Jan.-Nov. 1941-42, and July-November 1942-43

Manufactured tobacco	Jan.-Nov.			July-November		
	1942	1943	Change	1942	1943	Change
	1,000 pounds	1,000 pounds	Percent	1,000 pounds	1,000 pounds	Percent
Smoking	161,029	149,606	- 7.1	73,546	72,448	- 1.5
Plug	50,239	54,614	+ 8.7	24,532	25,783	+ 5.1
Twist	5,547	5,811	+ 4.8	2,595	2,590	- 0.2
Fine-cut	4,654	4,160	- 10.6	2,170	1,904	- 12.3
Scrap chewing	45,813	47,112	+ 2.8	22,884	22,897	+ 0.1
Snuff	37,219	39,456	+ 6.0	15,780	17,272	+ 9.5

Table 15.- Tobacco acreages in the United States, by types, average 1936-40, annual 1942 and 1943, and 1944 prospective acreage as of March 1

Class and type	Harvested acreage			1944 acreage 2/	
	Average 1936-40	1942	1943 1/	Prospective	Change from 1943
	1,000 acres	1,000 acres	1,000 acres	1,000 acres	Percent
Total flue-cured, types 11-14	954.8	792.7	846.4	996.3	+ 17.7
Old and Middle Belt, type 11	353.3	294.0	319.0	370.0	+ 16.0
Eastern North Carolina, type 12	318.6	266.0	285.0	339.0	+ 18.9
South Carolina, type 13	177.7	151.0	158.0	184.0	+ 16.5
Georgia-Florida, type 14	105.2	81.7	84.4	103.3	+ 22.4
Total fire-cured, types 21-24	123.1	72.8	73.8	76.6	+ 3.8
Virginia, type 21	22.9	13.6	14.0	16.0	+ 14.3
Ky. and Tenn., type 22	68.5	40.5	40.8	41.4	+ 1.5
Ky. and Tenn., type 23	30.1	18.5	18.8	19.0	+ 1.1
Henderson, type 24	1.6	.2	.2	.2	0.0
Burley, type 31	387.6	350.2	394.7	478.0	+ 21.1
Maryland, type 32	37.7	38.0	32.6	37.5	+ 15.0
Total dark air-cured, types 35-37	44.7	34.0	33.4	44.0	+ 31.7
One Sucker, type 35	22.2	16.8	17.3	23.0	+ 32.9
Green River, type 36	19.1	14.5	13.5	18.0	+ 33.3
Va. sun-cured, type 37	3.3	2.7	2.6	3.0	+ 15.4
Total cigar filler, types 41-44	43.7	43.4	38.7	37.4	- 3.4
Pa. Seedleaf, type 41	28.5	33.6	31.4	30.1	- 4.1
Miami Valley, types 42-44	15.2	9.8	7.3	7.3	0.0
Total cigar binder, types 51-56	38.8	36.3	32.5	35.0	+ 7.7
Conn. Valley Broadleaf, type 51	8.0	6.8	6.3	7.1	+ 12.7
Conn. Valley Havana Seed, type 52	7.0	7.6	6.7	7.1	+ 6.0
N. Y. and Pa. Havana Seed, type 53	1.2	1.3	.9	1.0	+ 11.1
Southern Wisconsin, type 54	12.0	9.2	8.9	9.5	+ 6.7
Northern Wisconsin, type 55	9.4	10.6	9.4	9.9	+ 5.3
Ga. and Fla. sun-grown, type 56	1.2	.8	.3	.4	+ 33.3
Total cigar wrapper, types 61-62	10.1	9.6	9.4	10.5	+ 11.7
Conn. Valley Shadegrown, type 61	7.0	6.1	6.3	7.6	+ 20.6
Ga. and Fla. Shadegrown, type 62	3.1	3.5	3.1	2.9	- 6.5
Miscellaneous	.5	.2	.3	.3	0.0
La. Perique, type 72	.5	.2	.3	.3	0.0
Total, all types	1,641.1	1,377.2	1,461.8	1,715.6	+ 17.4

1/ Indicated December 1, 1943. 2/ Indicated March 1, 1944.

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